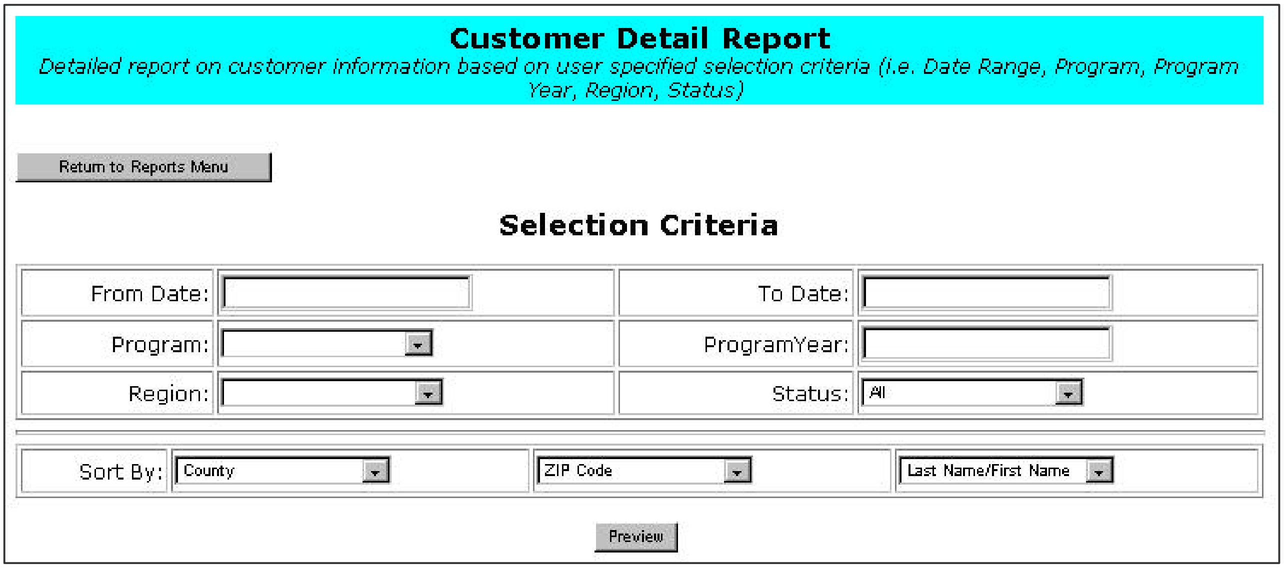
CUSTOMER DETAIL

Purpose: Allows you to use specific selection criteria to generate a detailed customer report.



To generate a Customer Detail report:

<u>Step by Step</u>

1. From the Reports Menu click on the Customer Detail Run Report button.

2. Enter the **From Date** (MM/DD/YYYY format) that you would like your report to begin with in the Selection Criteria area. This is a required field.

3. Enter the **To Date** (MM/DD/YYYY format) that you would like your report to end with in the Selection Criteria area. This is a required field.

4. Select a program from the **Program** drop down box. This field is optional. Blank (default) generates a report on all programs.

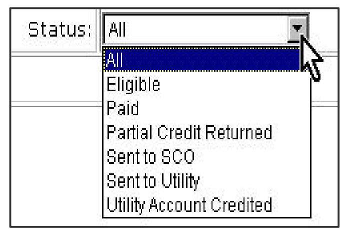
5. Enter the four-digit program year (YYYY format) that you would like your report to end with in the **Program Year** field. This is a required field.

6. Select a region from the **Region** drop down box (see Agency Profile Section to setup region(s)). The drop down selection includes a blank row (blank is "none"), an "All" selection and any agency defined regions. Default is blank.

Select the blank line (none) for a faster search. This selection is recommended for those agencies on a 56K modem or pulling a large date range.

If a "Region" is selected then the results are limited to only those zip codes assigned to that region in the Agency Profile "Regions". Leaving this field blank will ignore the regions and select all records for that agency.

7. Select a status in the **Status** field. Default is All.



8. Choose your selection criteria using the **Sort By** drop down arrow. This is optional. If no “sort by” features are selected, the report will display data alphabetically by customers’ last/first names.

The report header will list all the selection criteria used. Results are grouped by "Program" first, then by "Status” then by each Sort By option selected, if any.

9. Click the **Preview** button to review report.

Your report will generate according to the criteria you entered (e.g. if you chose to generate a report and sort your report by County, Zip Code and First Name/Last the following report will generate).

10. Click the **Return to Reports Menu** to return to the Reports Menu.

Report Fields

The Customer Detail Report will display the following fields in this order:

- Program
- Last Name/First Name
- Social Security Number
- Address
- Intake Date
- Eligible Amount
- Payment Amount
- City
- Zip Code

- County
- Program year
- Region
- Agency Control Code
- Enter Date
- Status
- Status Date

Refer to your Data Dictionary located in the Miscellaneous section of this Reference Manual for field definitions.

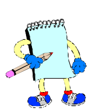
The Totals column at the end of the report display the following totals:

- Total Number of Clients
- Total Eligible Amount for Clear/Eligible Records
- Total Eligible Amount for Sent Records
- Total Payment Amount for Paid/Credited Records
- Total Eligible Amount for All Records
- Total Payment Amount for All Records

ERROR MESSAGES

If there is no available data or you did not enter data in all the required fields, you will receive the following error message informing you that no data was retrieved.

1. Click the **Return to Customer Detail Report** button to return to the Customer Detail Report or Click the **Return to Reports Menu** button to return to Reports Menu.



Refer to your Data Dictionary located in the Miscellaneous section of this Reference Manual for field definitions.